



Experian Automotive Quarterly Briefing

First quarter 2018 automotive market share trends and registrations

Marty Miller | Senior Product Manager and Industry Consultant



Today's presentation



What's on the Road

VIO by model year, segment, age and market share

U.S. light duty vehicles through March 31, 2018

New, Used and other market changes

Industry news analysis

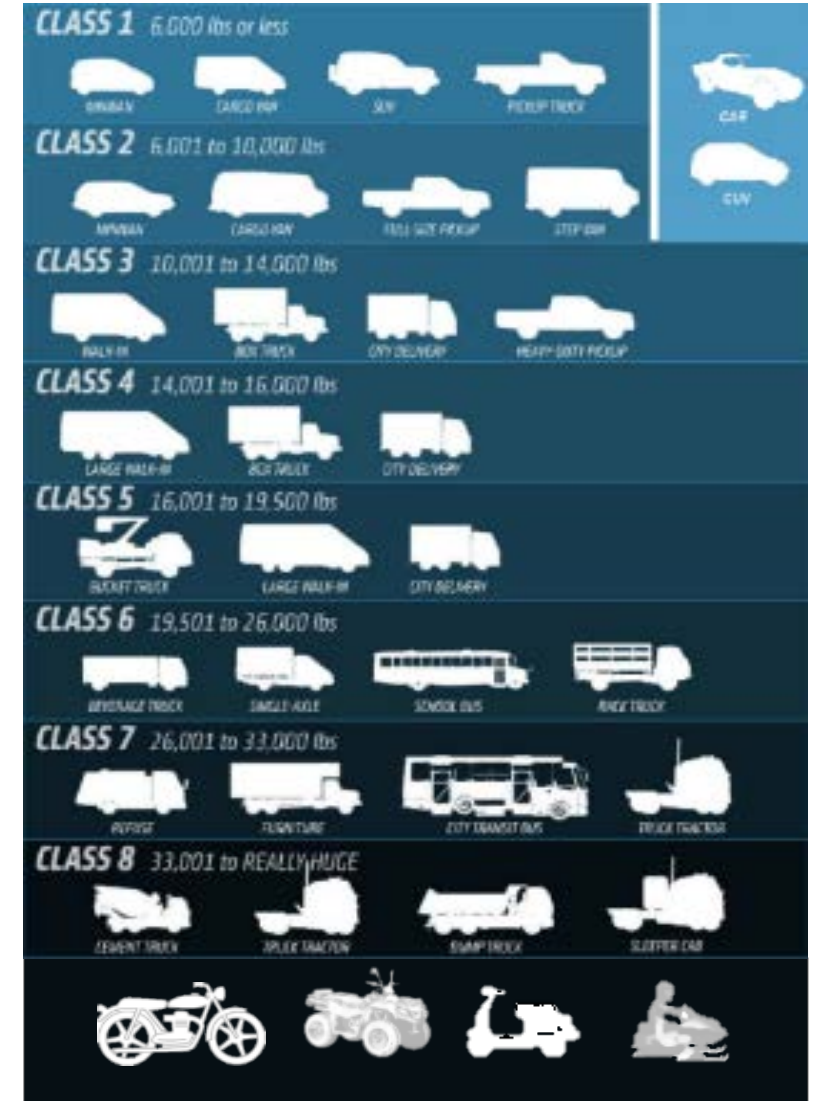
Questions? Contact us at Auto@experian.com

U.S. and Canada total Vehicles in Operation = 317.6M

Light Duty
Passenger Cars, Light Trucks, Vans
Cars and GVW Class 1 – 3

Medium & Heavy Duty
Large Vans, Delivery Trucks, Buses, RVs,
Cement Trucks, Semi-Tractors
GVW Class 4 - 8

Power Sports
Motorcycles, All-Terrain,
Utility Task, Snowmobiles





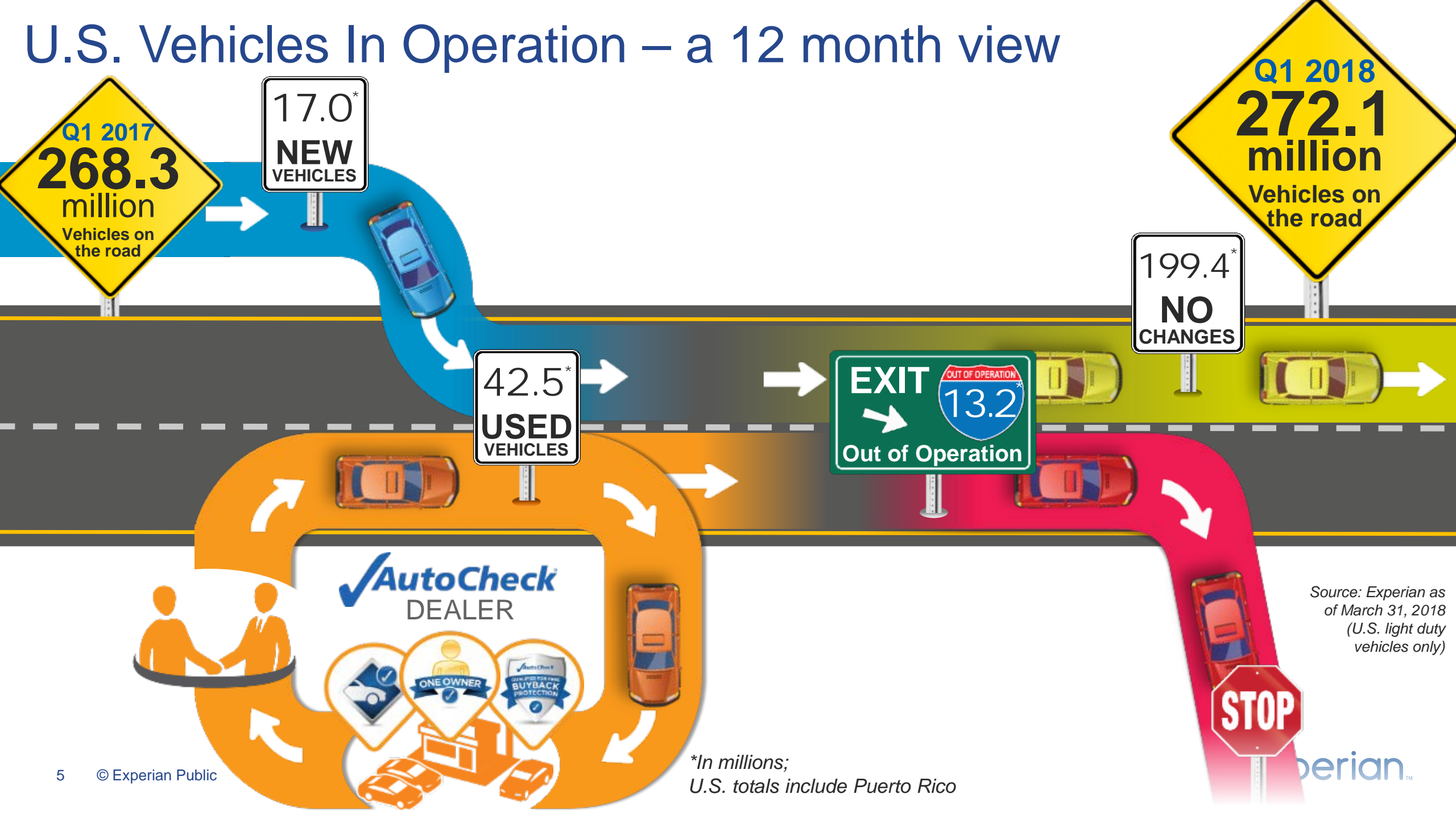
Vehicles in Operation

What's on the road today?

Light Duty Vehicles



U.S. Vehicles In Operation – a 12 month view



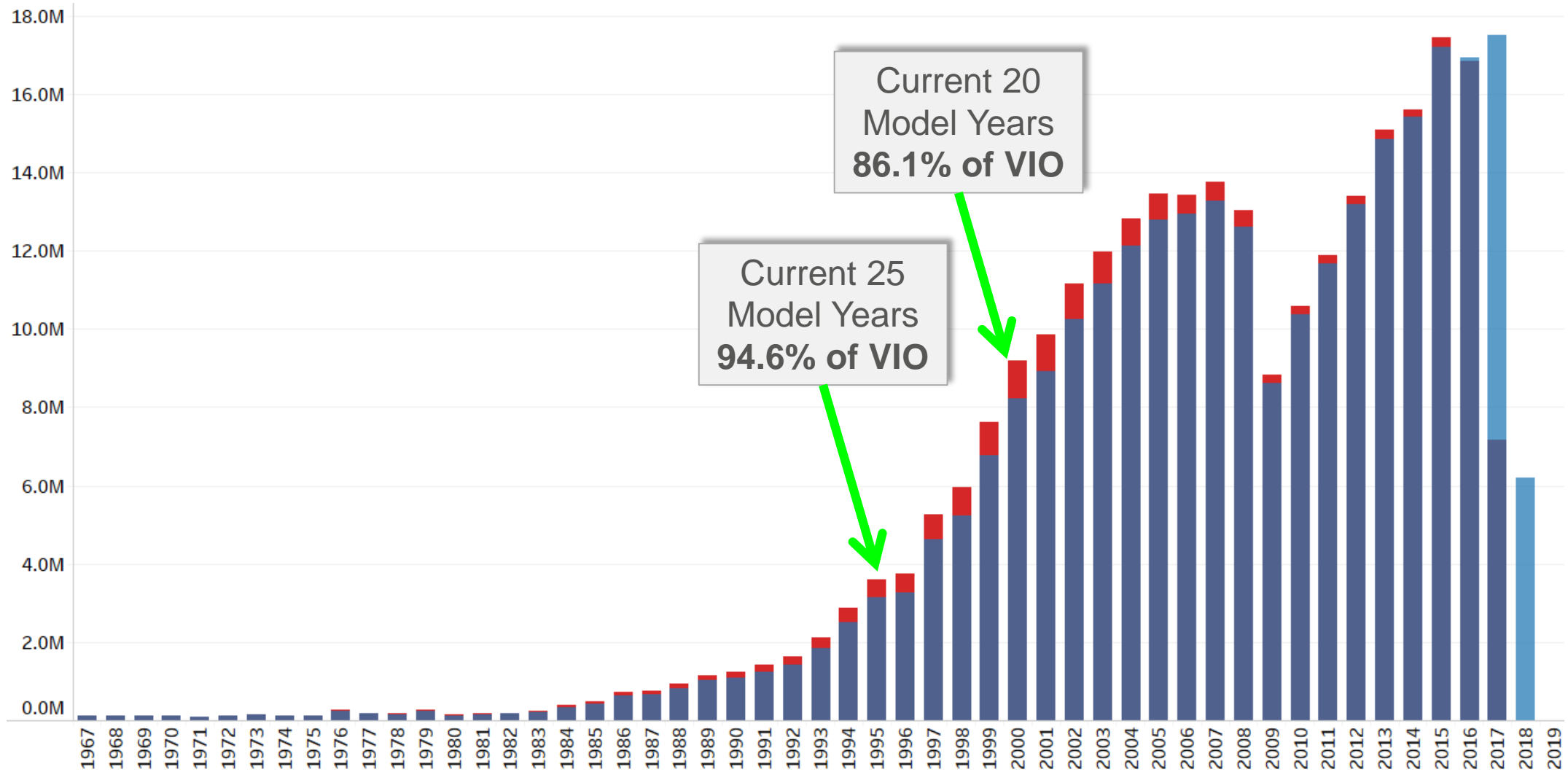
Source: Experian as of March 31, 2018 (U.S. light duty vehicles only)

*In millions; U.S. totals include Puerto Rico

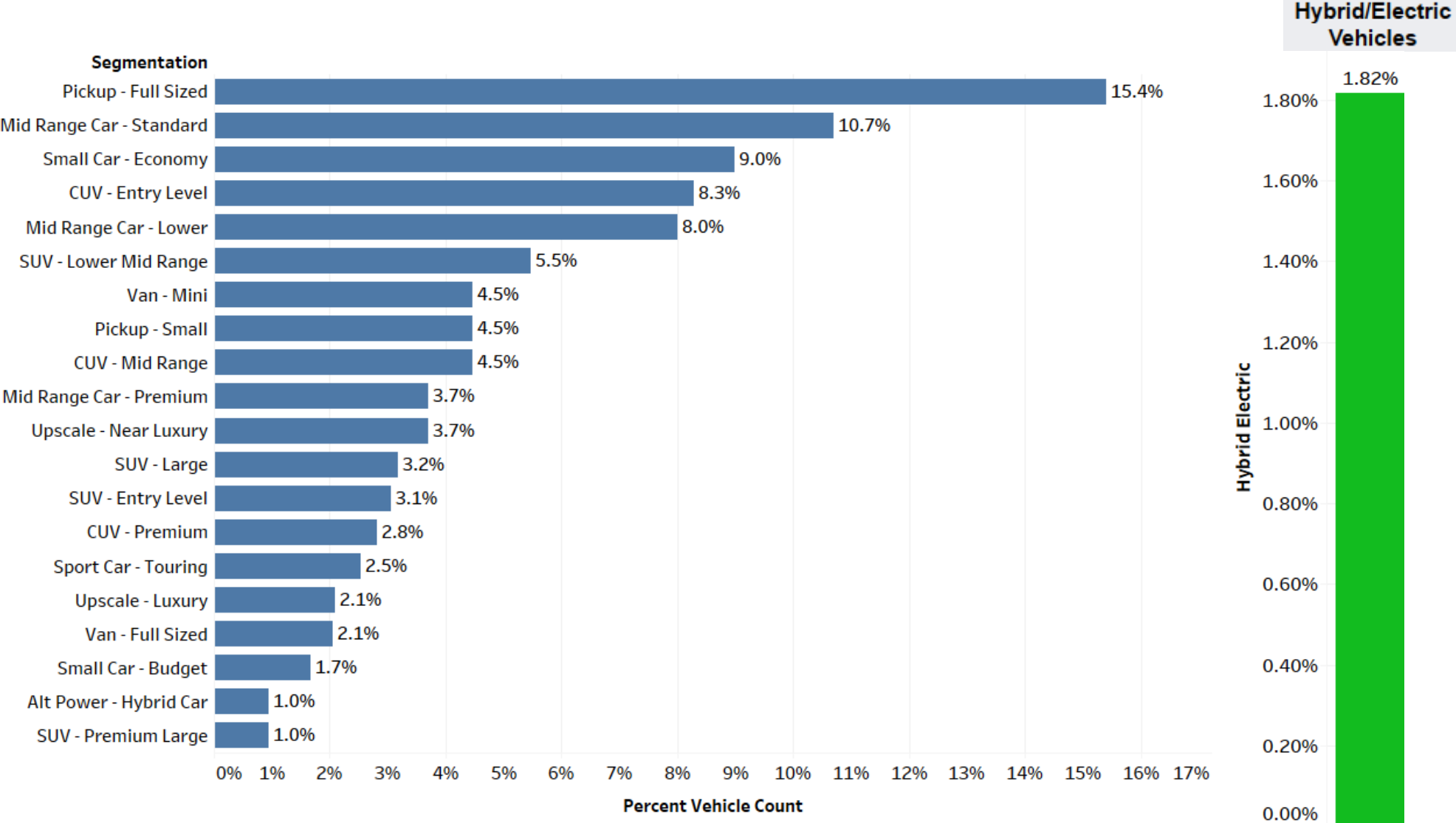
U.S. VIO change by model year (in millions)

Q1 2017 to Q1 2018

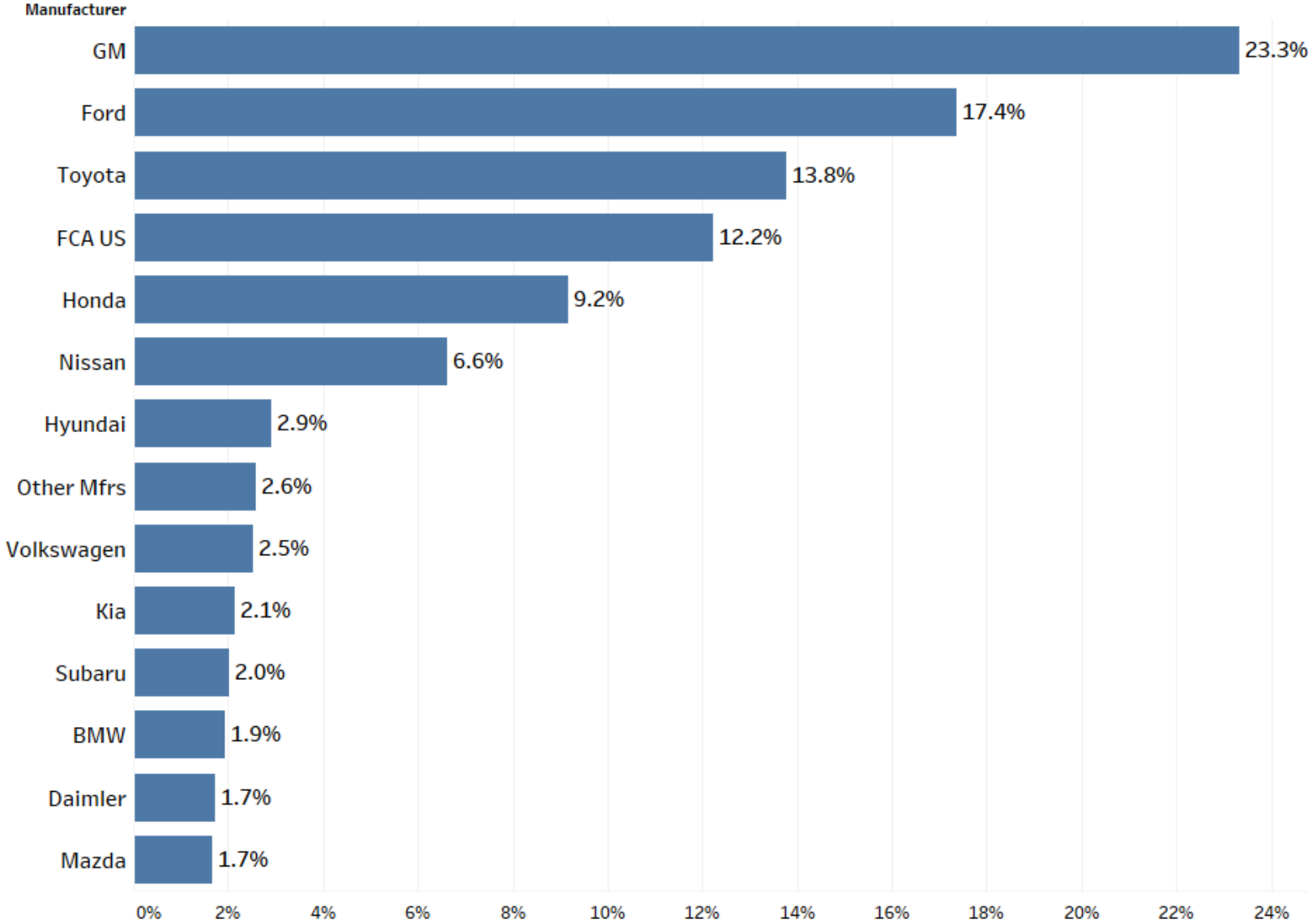
Out of operation
New vehicle sales
Carryover vehicles



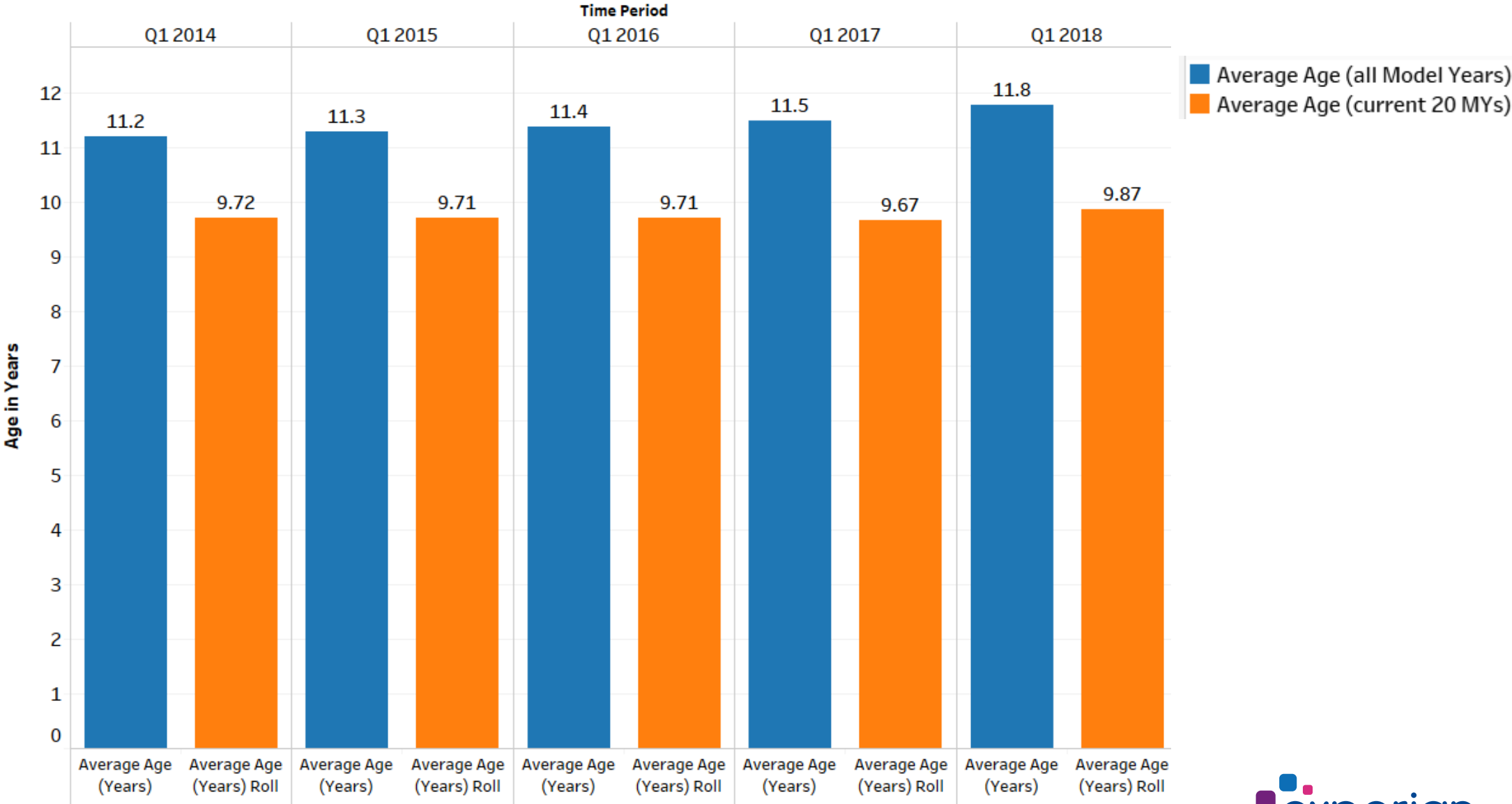
U.S. VIO Top 20 segments on the road market share



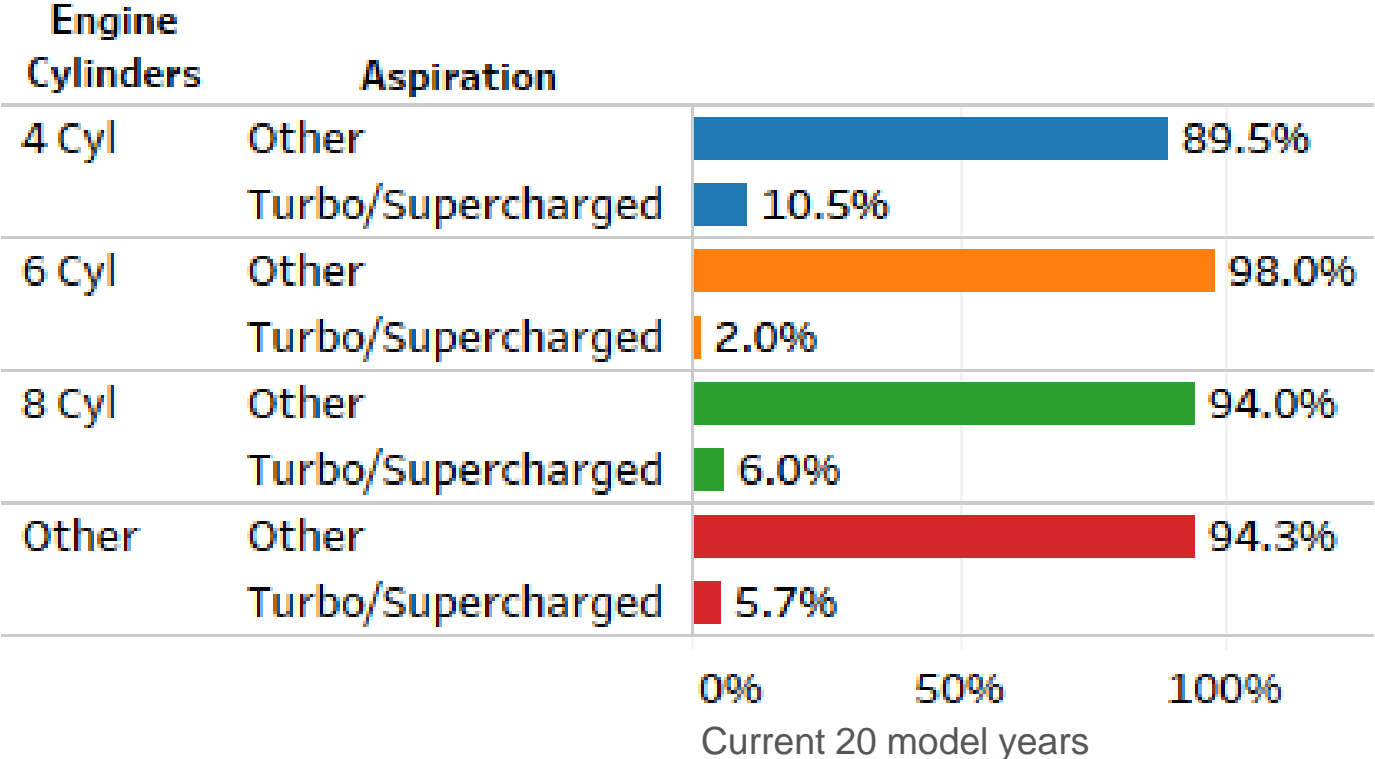
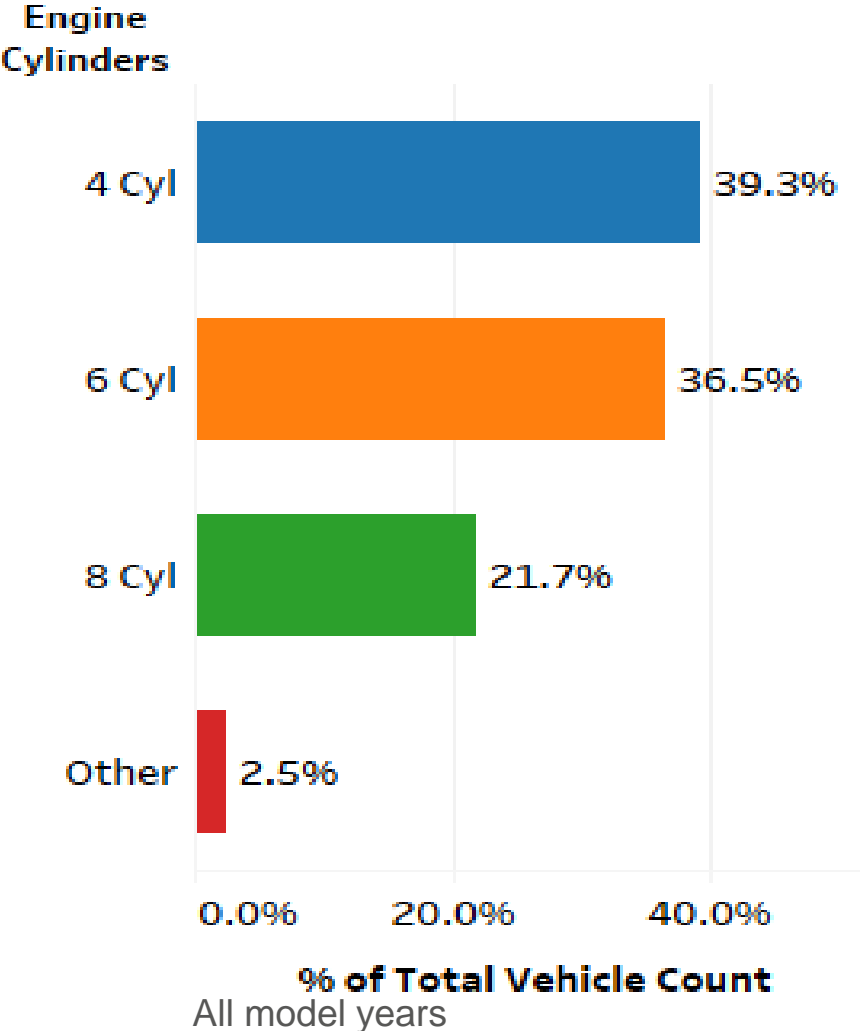
U.S. VIO by manufacturer market share



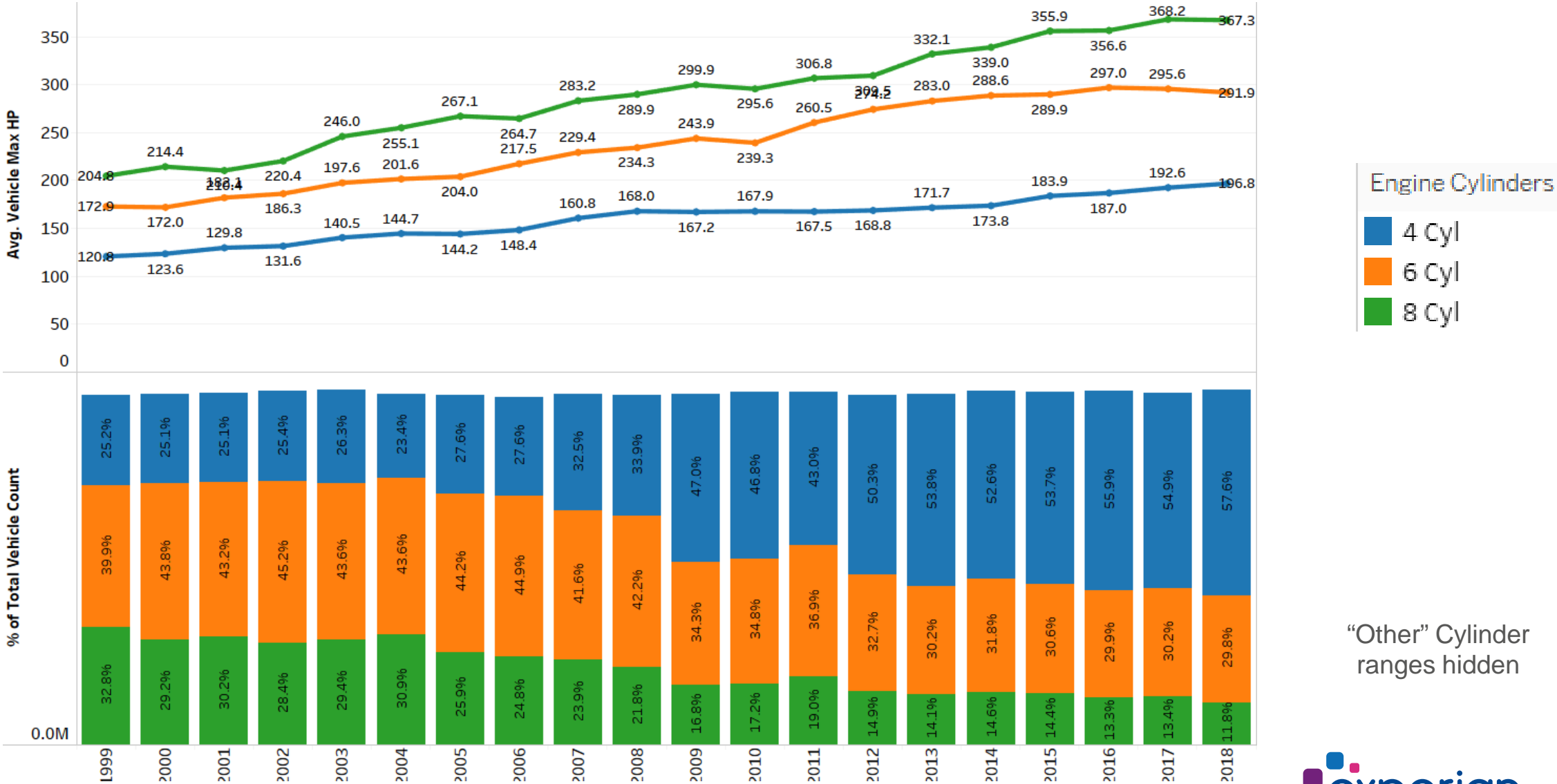
U.S. VIO Average Age for all vehicles and current 20 MYs



Cylinder market share and 20 years of Turbo/Supercharged



Cylinder Percentage of Coverage by Model Year and HP



Source: Experian Automotive as of March 31, 2018 (light duty vehicles only)



The aftermarket “Sweet Spot” overview

“Post” and “Pre” Sweet Spot defined

The Aftermarket “*Sweet Spot*”

- 6 to 12 model year old vehicles
- Aged out of general OEM manufacturer warranties for any repairs
- Likely require more part replacement & services (e.g. shocks, timing belt service, engine repairs) that may be performed by aftermarket service shops using parts from aftermarket part manufacturers
- Sizing the Sweet Spot helps identify overall market potential and changes can have implications to those that service it

“*Post Sweet Spot*” vehicles

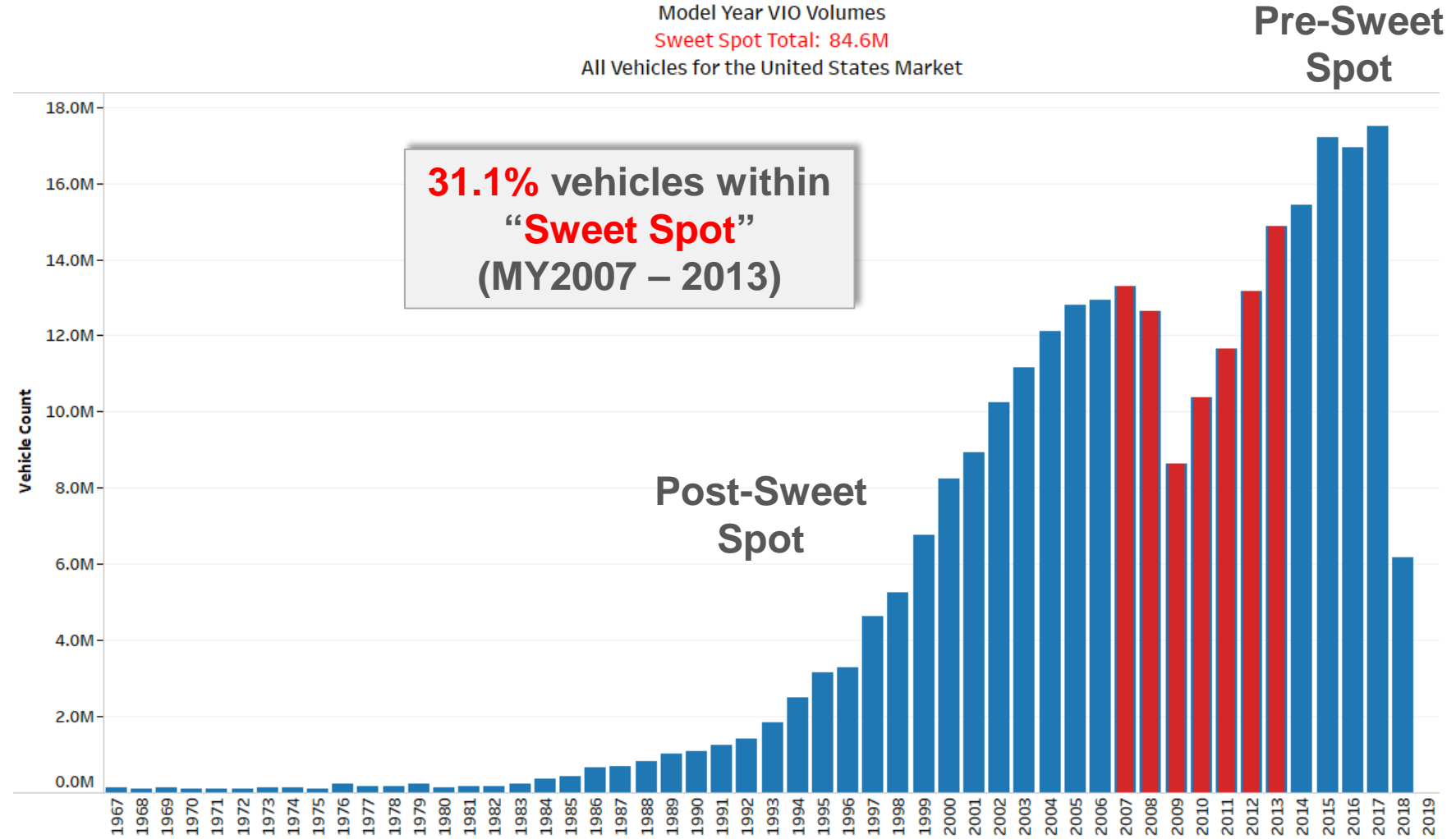
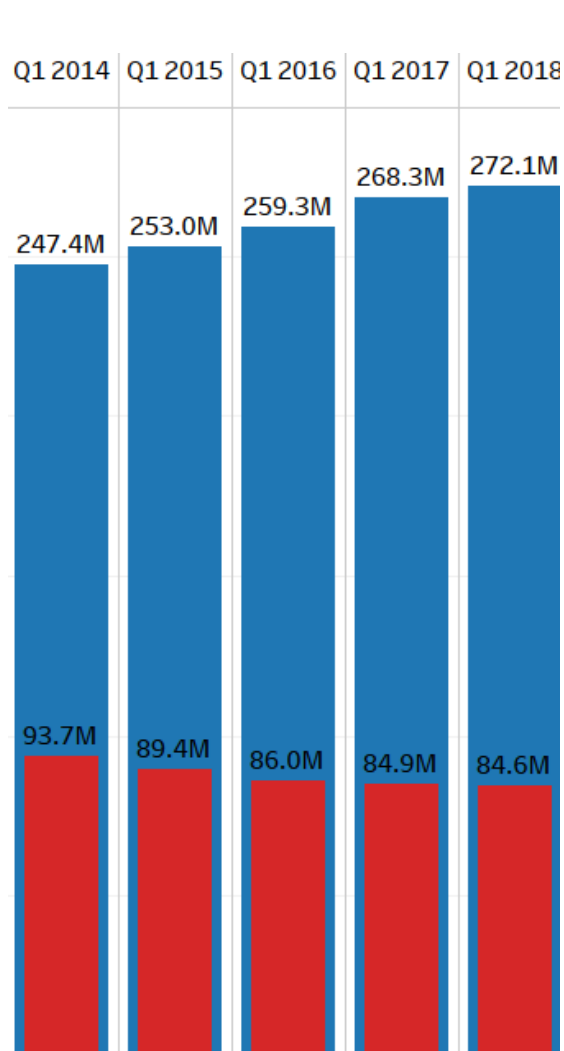
- 13 model years old & older
- Less costs may be spent to service them due to their age and vehicle value

“*Pre Sweet Spot*” vehicles

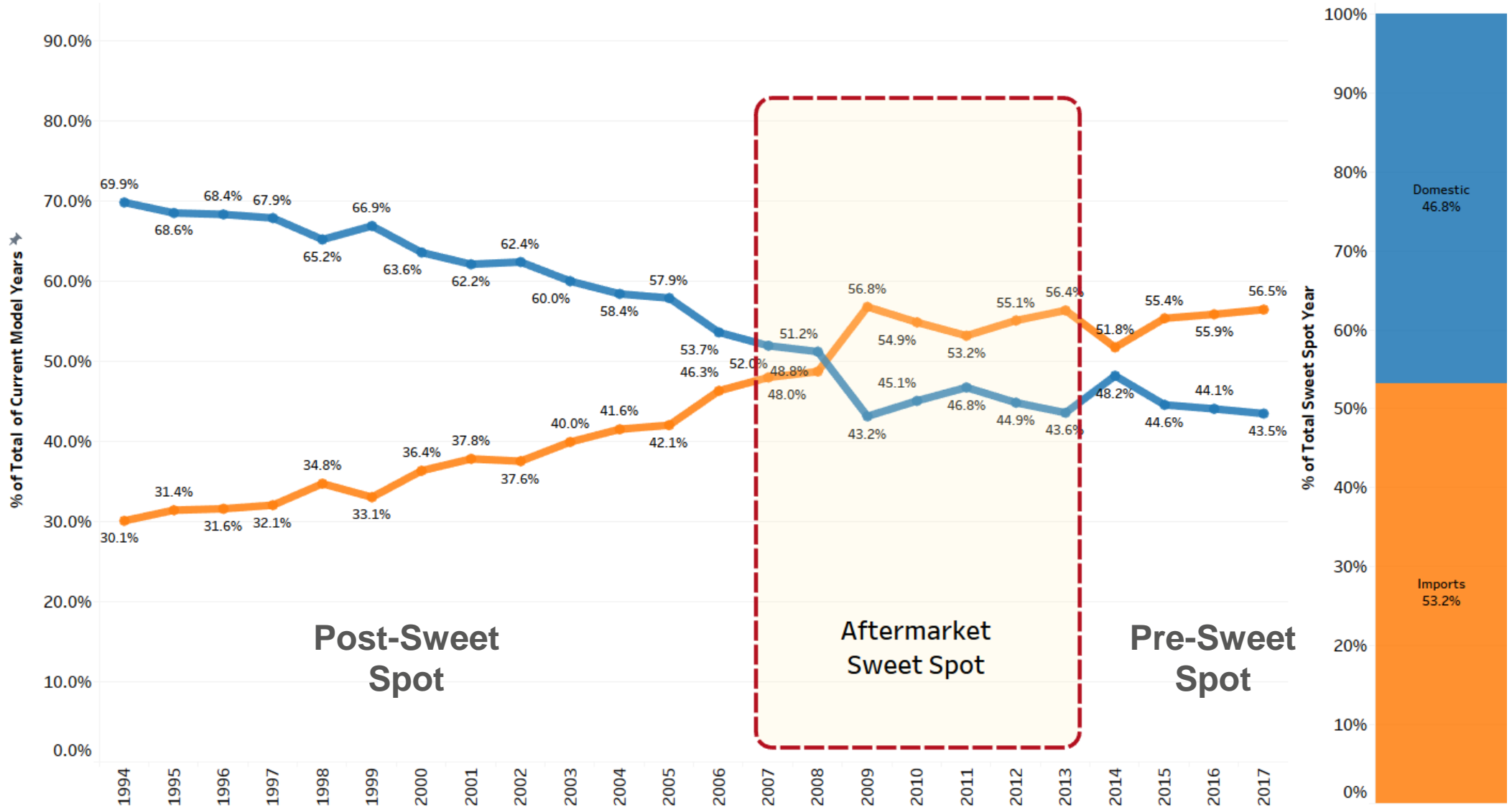
- 5 model years old & newer; many covered by the vehicle’s manufacturer warranty
- Identifies models coming into the Sweet Spot

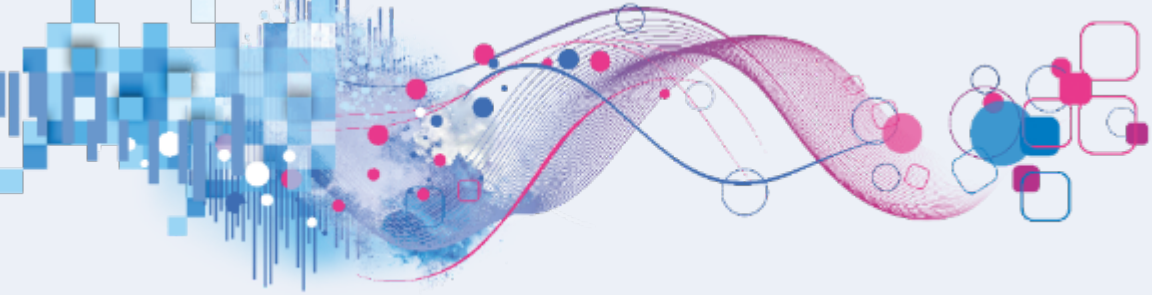
U.S. trend of total VIO compared to sweet spot volumes

VIO by model year (in millions)



U.S. Sweet Spot vehicles – domestic vs import brands

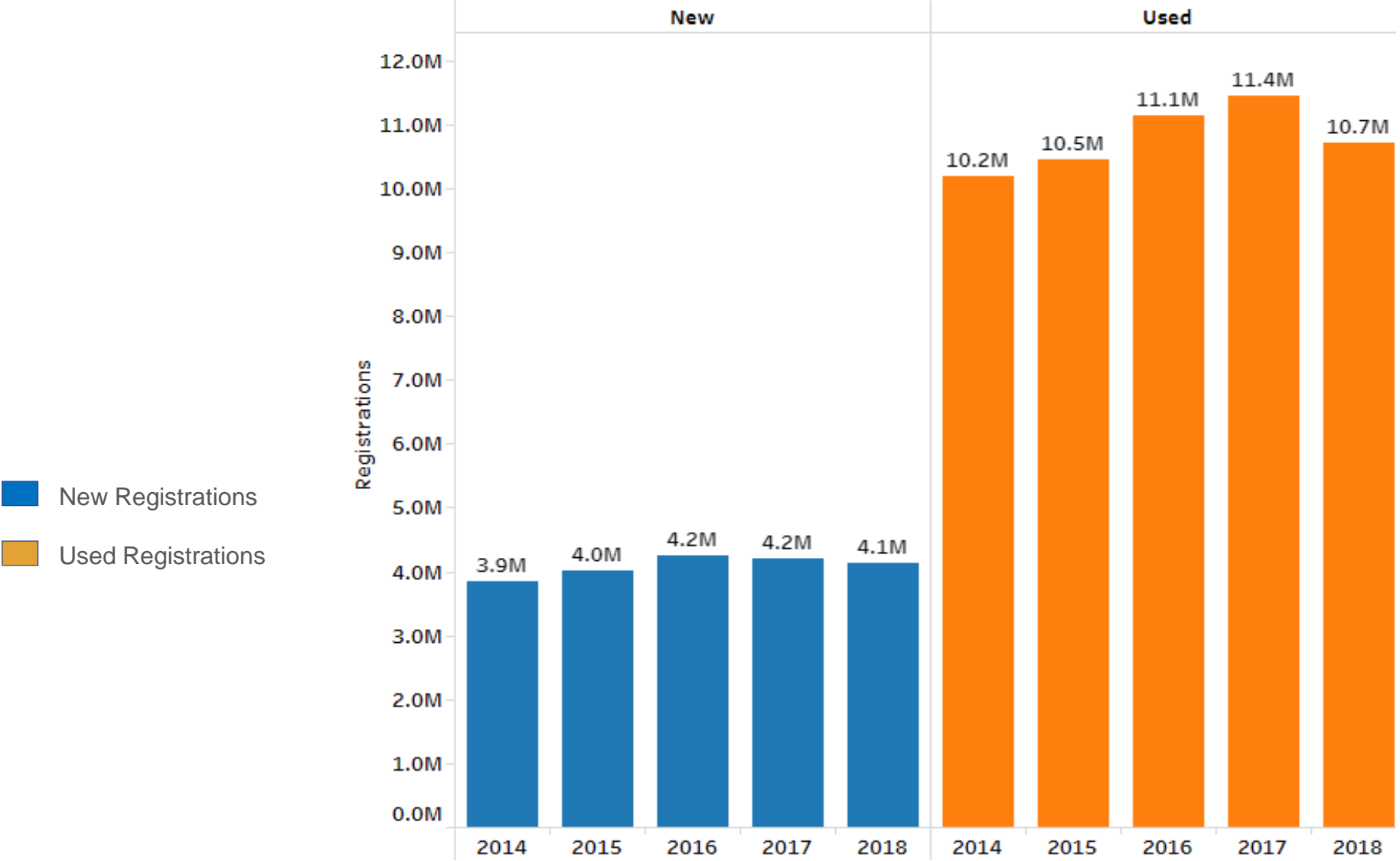




New and Used Vehicles

Volumes and market share

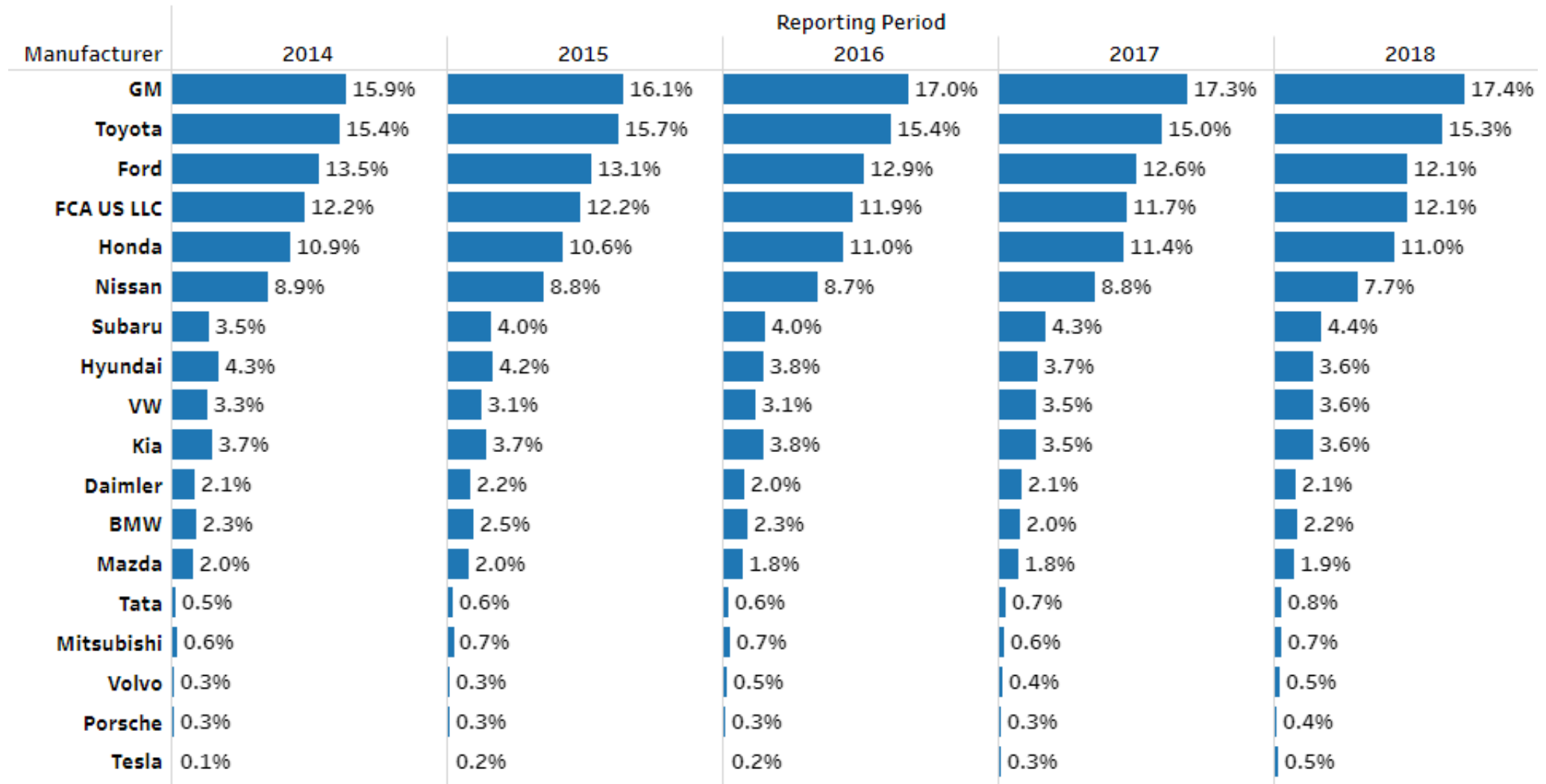
New vs Used vehicle registrations 1st quarter trend



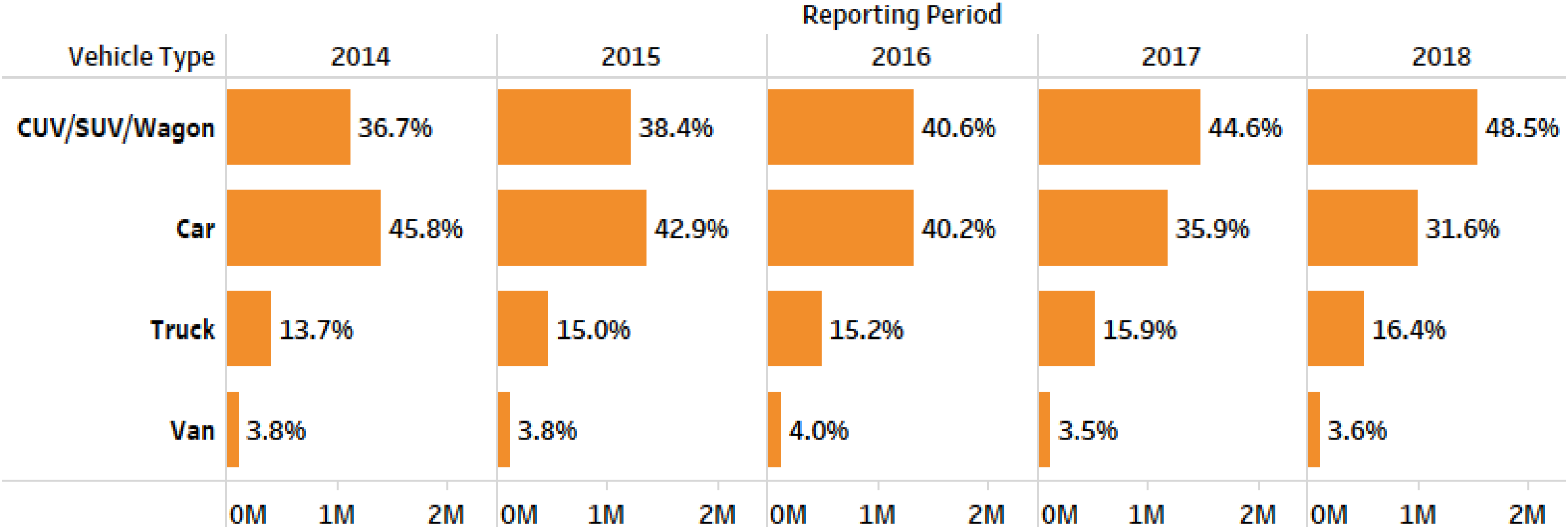
Source: Experian Automotive as of March 31, 2018 (light duty vehicles only)



New vehicle registrations for the 1st quarter - Manufacturer



New vehicle registrations for the 1st quarter – Vehicle Type



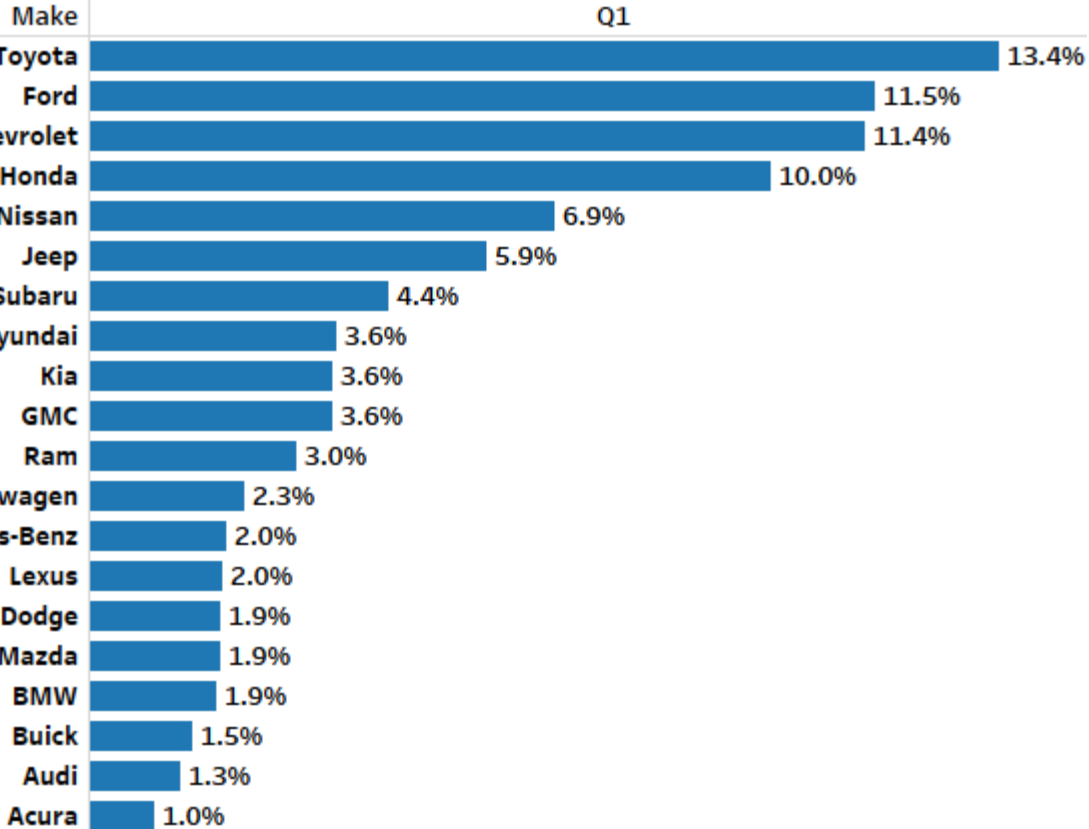
New vehicle registrations for the 1st quarter

Top Makes and Models

Reporting Period

2018

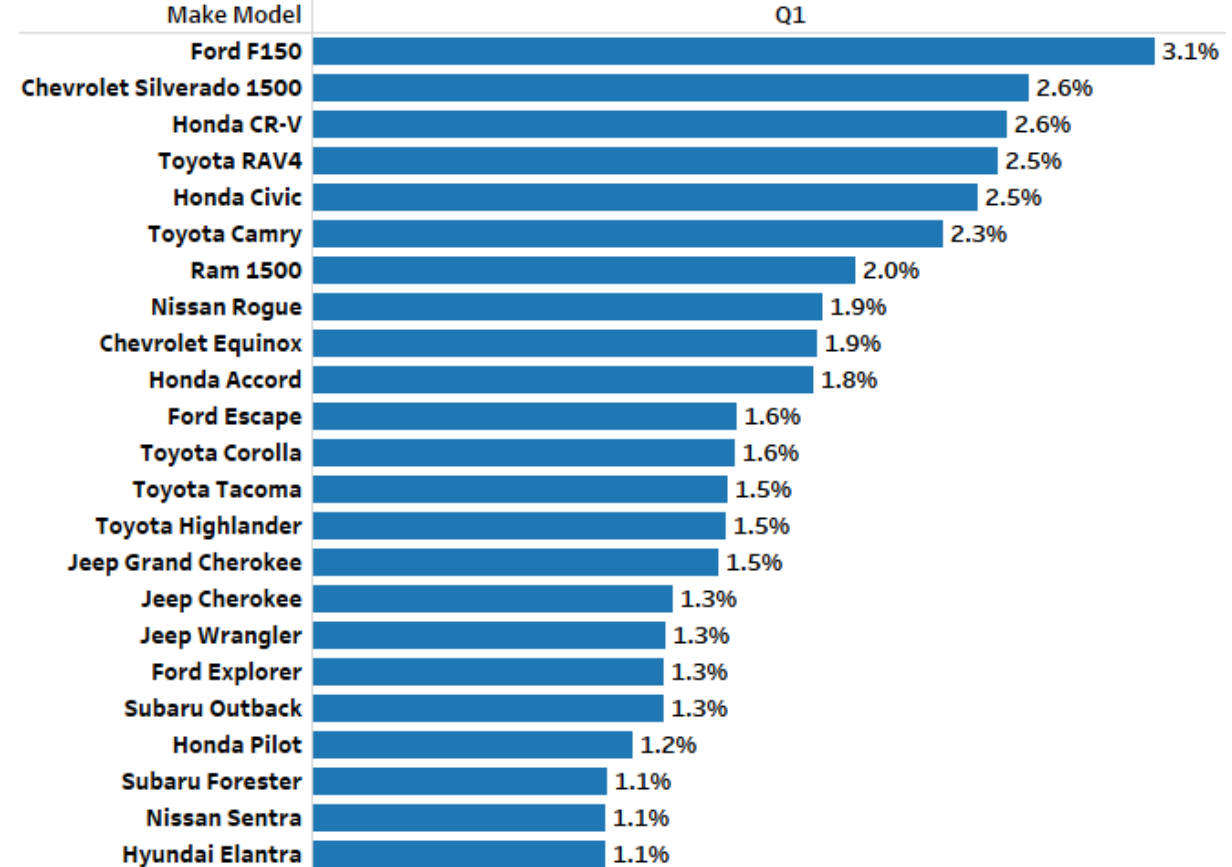
Q1



Reporting Period

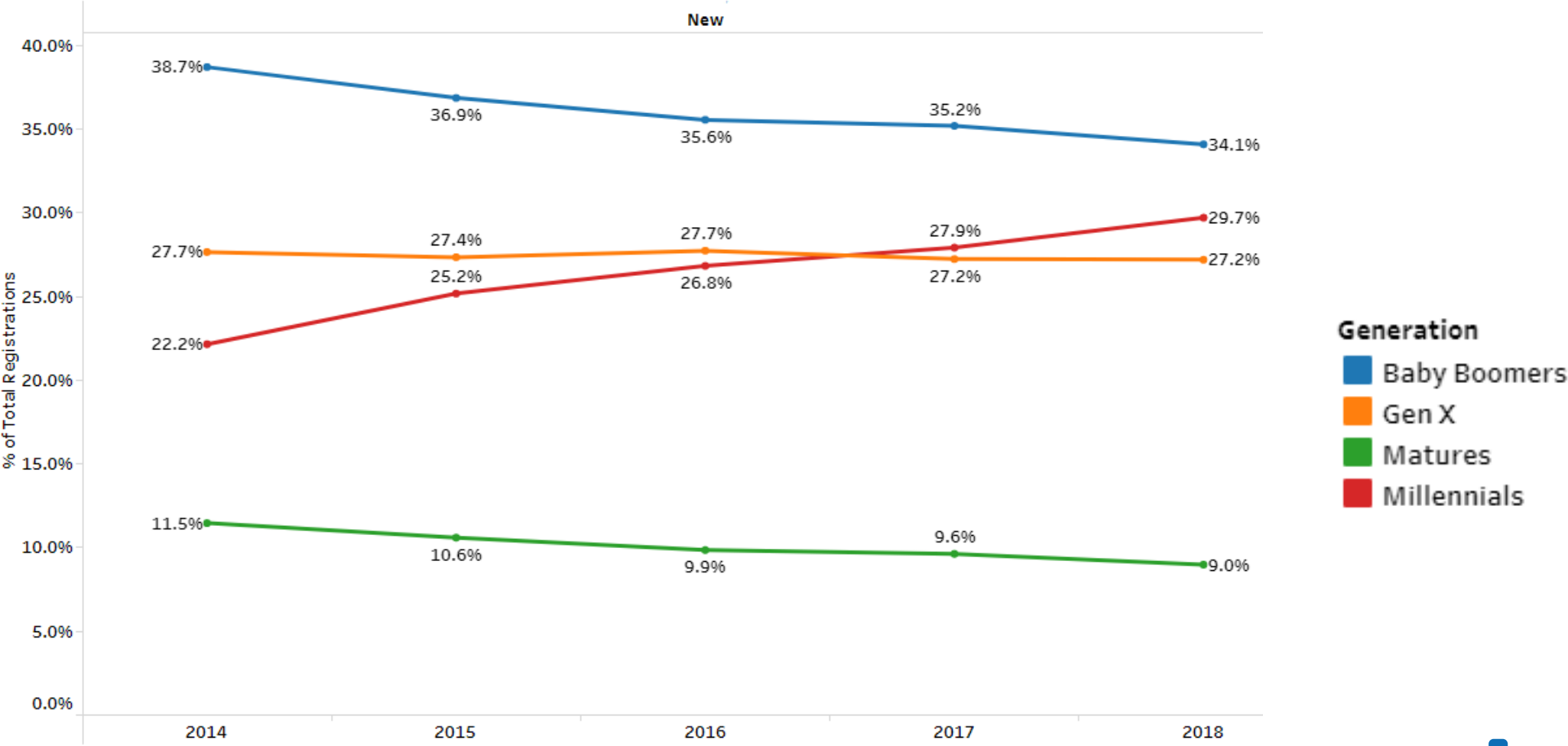
2018

Q1



New vs Used vehicle registrations demographic generation

1st quarter trend





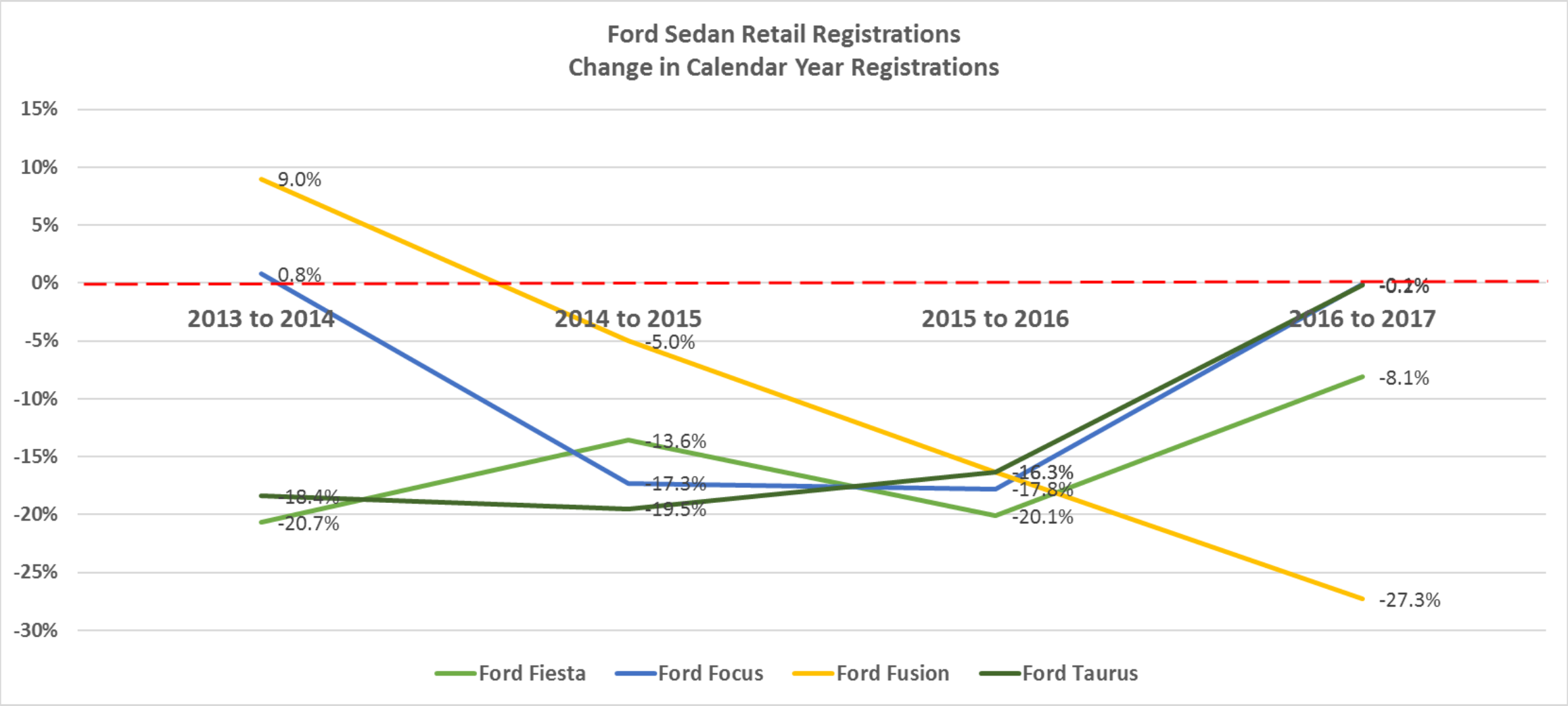
Automotive Market News

Ford to stop selling sedans

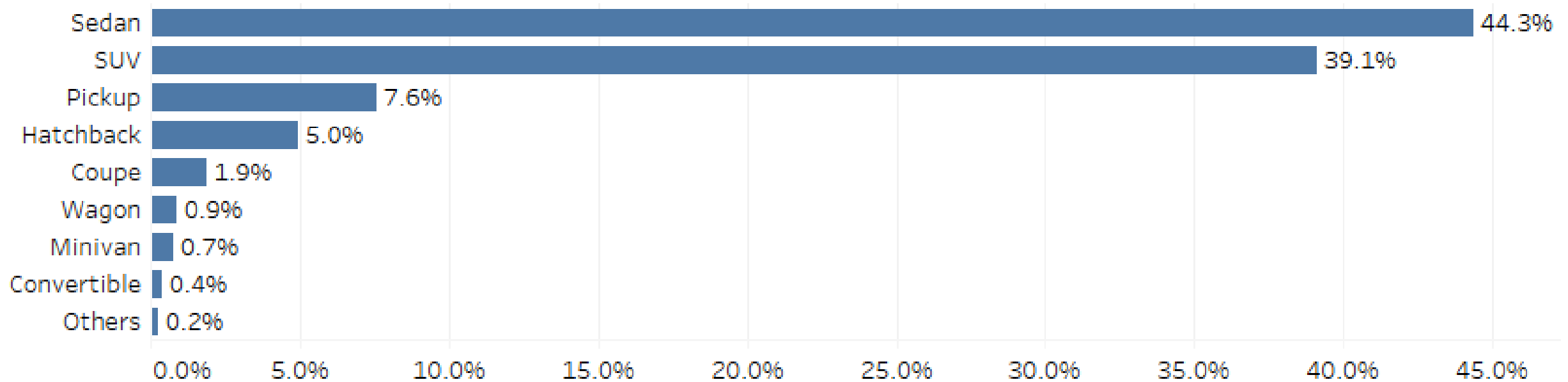
Tariffs – who might be affected?



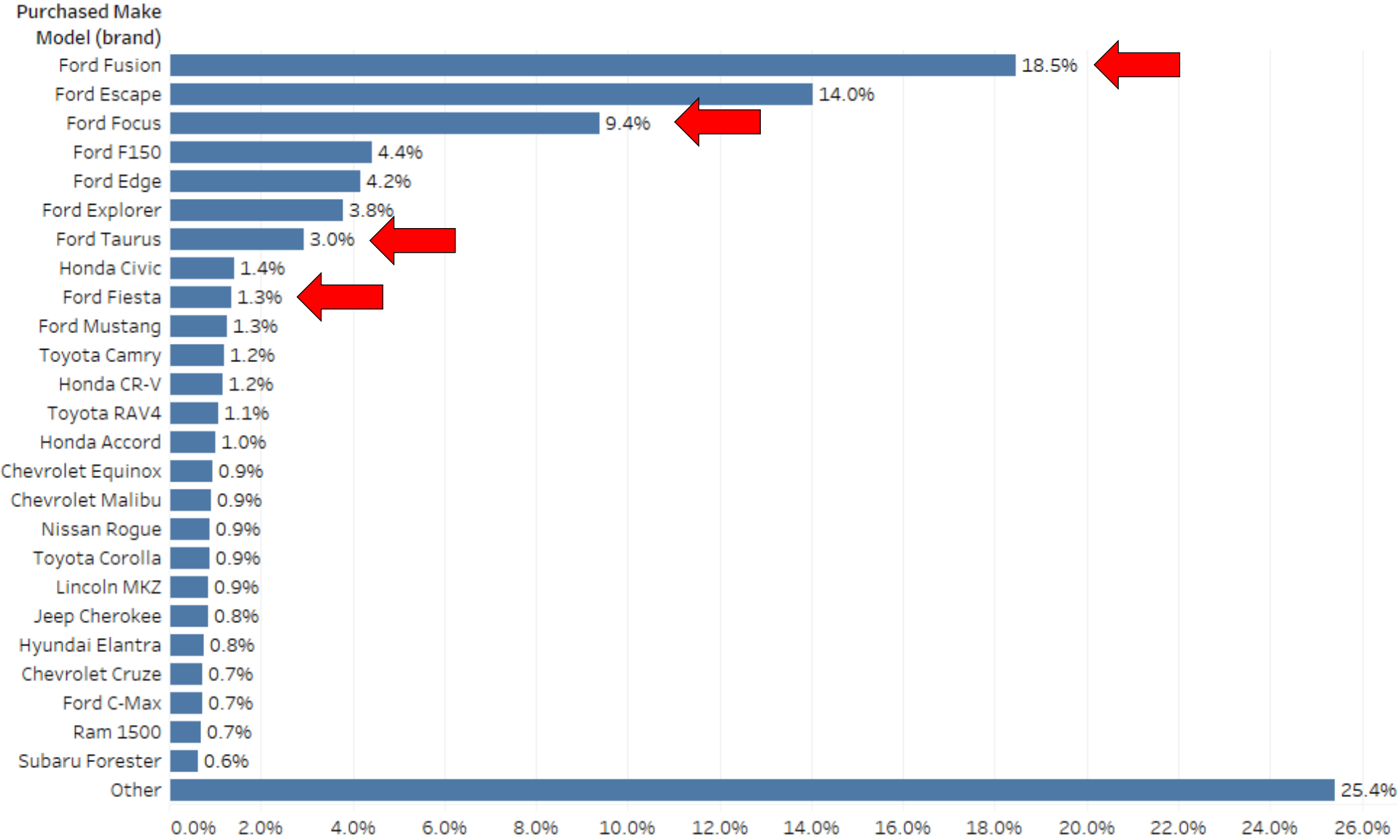
Ford sedan new registrations trend



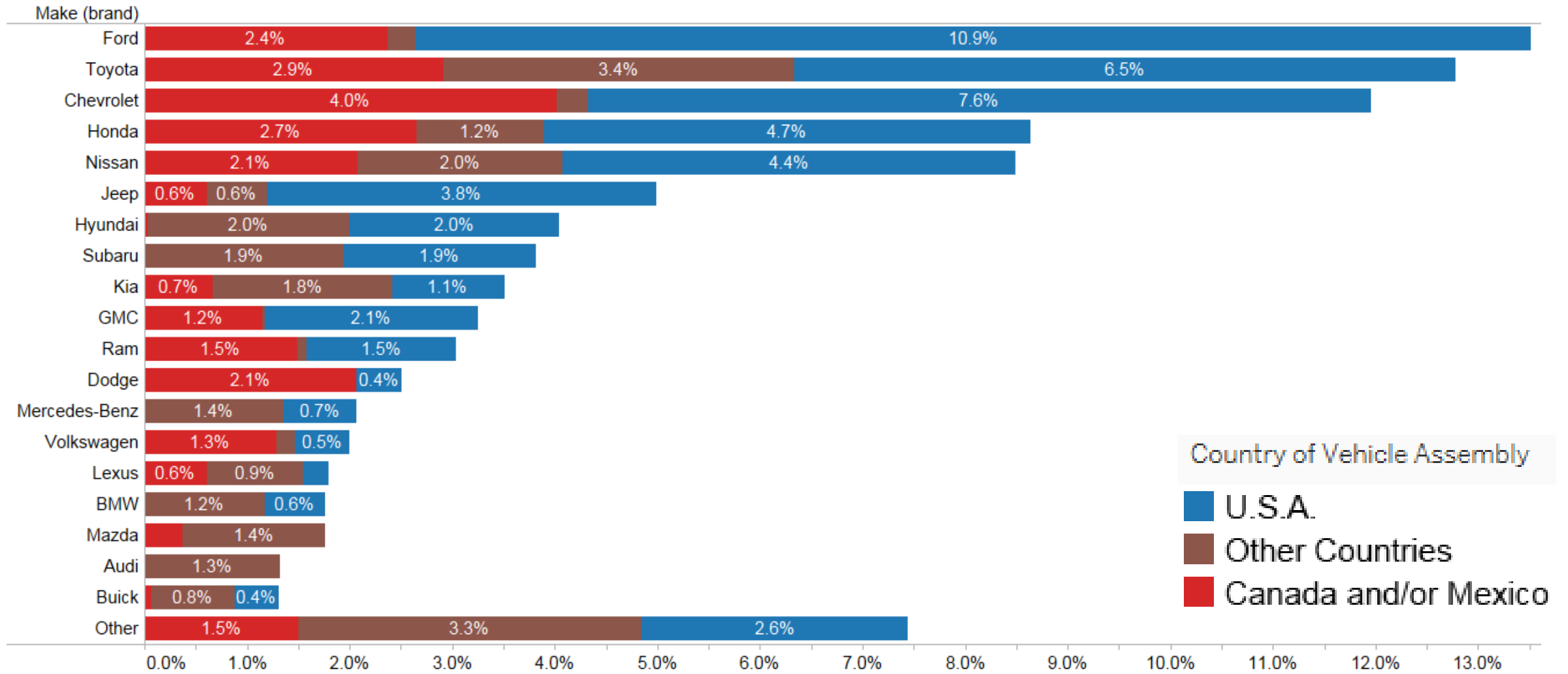
Measure loyalty of Ford sedan owners and view types of vehicles they purchase upon disposal of Ford sedans



Measure loyalty of Ford sedan owners and Models they buy



Tariffs – Where are the newest vehicles made?



Source: Experian Automotive April 2017 – March 2018 light duty, new registrations

Summary

- Total light duty VIO continues to grow to 272.1 million in the U.S. market
- VIO market share for GM and Ford continues to decline as older vehicles move out of operation
- Sweet Spot has stopped declining and has started on its growth spurt that is expected to continue for several years
- New and Used vehicle registrations for the first quarter have dipped a little, though still are above 2015 figures
- Cross overs registrations of new vehicles continue to increase in sales over prior time periods
- Millennial buyers have increased and are now the 2nd largest buying generation within the U.S. market



Today's presentation



Follow us on **Twitter**
#EXPAuto
@Experian_Auto

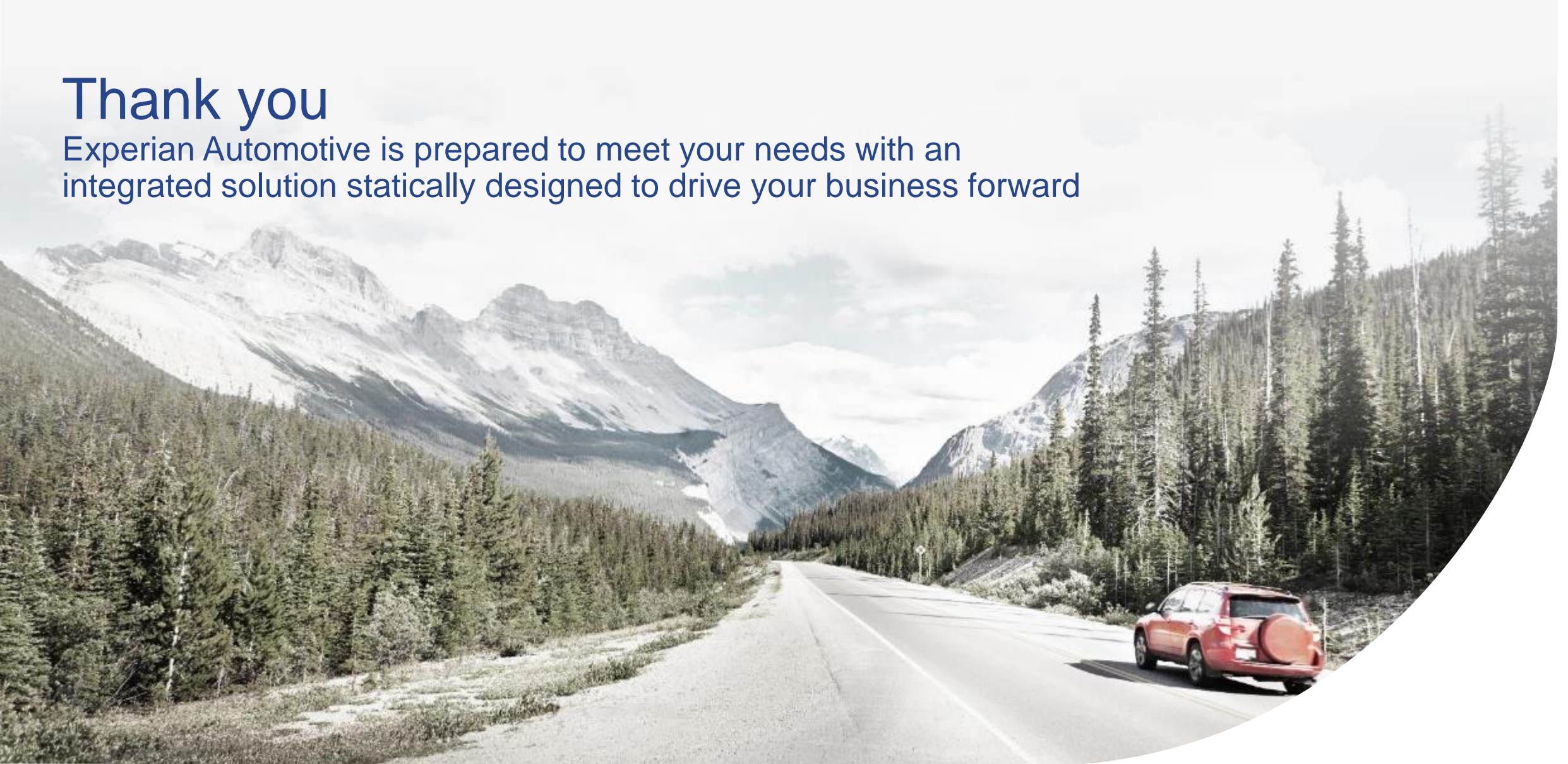


Connect with us on **LinkedIn**
Experian Automotive

- Presentation will be available after the Webinar
- Email with a link will be sent to all registrants to download
- Questions? Contact us at Auto@experian.com

Thank you

Experian Automotive is prepared to meet your needs with an integrated solution statically designed to drive your business forward





©2018 Experian Information Solutions, Inc. All rights reserved. Experian and the Experian marks used herein are trademarks or registered trademarks of Experian Information Solutions, Inc. Other product and company names mentioned herein are the trademarks of their respective owners. No part of this copyrighted work may be reproduced, modified, or distributed in any form or manner without the prior written permission of Experian.

Experian Public